

2025

Population Technical Bulletin

Martin County Board of County Commissioners

**Prepared by the
Growth Management Department**



Introduction

Florida Statutes, Chapter 163.3177(1)(f)3, requires local government comprehensive plans to be based on permanent and seasonal population estimates and projections. Various elements of the Martin County Growth Management Plan (CGMP), such as Future Land Use, Housing and Capital Improvements, are directly based on population data. The appropriate resident and seasonal population figures are critical to the local government in assessing future needs for services, facilities, and residential housing.

Policy 4.1D.2. of the CGMP requires the County to annually produce a population technical bulletin. The Population Technical Bulletin is based primarily on U.S. Census data and data provided by the University of Florida Bureau of Economic and Business Research (BEBR), for the State of Florida Office of Economic and Demographic Research (EDR) for population estimates and projections. BEBR medium permanent estimates and projections are used to generate population data for the County, the municipalities and for the unincorporated area. The data is then used for planning purposes such as projecting the future needs for housing and public facilities.

According to the U.S. Census, population estimates are "The calculated number of people living in an area as of a specified point in time, usually July 1st. The estimated population is calculated using a component of change model that incorporates information on natural increase (births, deaths) and net migration (net domestic migration, net international migration) that has occurred in an area since the latest decennial census." When this bulletin uses that term, population estimates refer to the estimated population for the current year.

According to the U.S. Census, population projections are "Estimates of the population for future dates. They illustrate plausible courses of future population change based on assumptions about future births, deaths, net international migration, and net domestic migration." Projected numbers are typically based on an estimated population consistent with the most recent decennial census as enumerated, projected forward using a variant of the cohort-component method. When this bulletin uses that term, population projections refer to estimates for future years.

The Population Technical Bulletin contains three sections: Population Estimates and Projections Methodology, Population Estimates and Projections for Municipalities and the Unincorporated Area; and Planning Area Estimates and Projections.

Definitions

Population categories are defined: as follows:

Peak population (facility): The number of permanent residents and seasonal visitors. It is calculated by adding permanent population to seasonal population (facility) to calculate the peak population for level of service planning. This definition includes tourists, migrant farmworkers, prisoners, group home residents, and other short-term and long-term visitors.

Peak population (housing): The number of residents living in residential housing units for more than six months of the year, and the number of occupants of residential housing who spend less than six months in Martin County equals peak population (housing). It is calculated by adding permanent population (housing) and the seasonal population (housing) to determine the total demand for residential housing units.

Permanent population: The number of residents living in the unincorporated area for more than six months of the year. This includes permanent residents in households as well as prisoners and group homes.

Permanent population (housing): The number of residents living in the unincorporated area in residential housing units for more than six months of the year.

Persons per household (unincorporated Martin County): The number of permanent residents living in residential housing units (classified by the Census as population in occupied housing) divided by the number of occupied housing units (provided by the US Census or EDR in a given year) to arrive at the persons per household for unincorporated Martin County.

Seasonal population (facility): The number of people in the unincorporated area defined as seasonal population (housing) plus part-time inhabitants who use, or may be expected to use, public facilities or services, but are not residents. This includes tourists, migrant farmworkers, and other short-term and long-term visitors. (Adapted from Section 163.3164 F.S.)

Seasonal population (housing): The number of residents living in residential housing units who spend less than six months in Martin County. The seasonal population in terms of the demand for residential housing units is calculated by multiplying the persons per household, unincorporated area, by the "vacant seasonal housing units" as classified by the US Census and defined in this chapter.

Historic Growth

Martin County			Florida	
	Estimated	Percent Change	Estimated	Percent Change
1998	121,749		15,000,475	
1999	124,360	2.14%	15,322,040	2.14%
2000*	126,731	1.91%	15,982,824	4.31%
2001	128,873	1.69%	16,331,739	2.18%
2002	131,051	1.69%	16,674,608	2.10%
2003	134,491	2.62%	17,071,508	2.38%
2004	137,637	2.34%	17,516,732	2.61%
2005	141,059	2.49%	17,918,227	2.29%
2006	142,645	1.12%	18,349,132	2.40%
2007	143,737	0.77%	18,680,367	1.81%
2008	143,868	0.09%	18,807,219	0.68%
2009	143,856	-0.01%	18,750,483	-0.30%
2010*	146,318	1.71%	18,801,310	0.27%
2011	146,689	0.25%	18,905,048	0.55%
2012	147,203	0.60%	19,074,434	0.90%
2013	148,077	0.59%	19,259,543	0.97%
2014	148,585	0.34%	19,507,369	1.29%
2015	150,062	0.99%	19,815,183	1.58%
2016	150,870	0.54%	20,148,654	1.68%
2017	153,022	1.43%	20,484,142	1.67%
2018	155,556	1.66%	20,840,568	1.74%
2019	158,598	1.96%	21,208,589	1.77%
2020*	158,431	-0.11%	21,596,068	1.83%
2021	159,053	0.39%	21,898,645	1.40%
2022	161,655	1.64%	22,276,132	1.72%
2023	162,847	0.74%	22,634,867	1.61%
2024	164,853	1.23%	23,014,551	1.68%

Source: Florida Office of Economic & Demographic Research (EDR) in conjunction with the Bureau of Economic and Business Research (BEBR). The 2024 estimate are from the Projections of Florida Population by County, 2025-2050, with Estimates for 2024. Volume 58, Bulletin 201, August 2025. Previous years are from BEBR reports for each specific year.

*Source: Decennial Census

Population Estimates and Projections Methodology

The Florida Legislature's Office of Economic & Demographic Research (EDR) is a research arm of the Legislature concerned with forecasting economic and demographic trends that affect policy making. EDR annually provides the Executive Office of the Governor population estimates of local governmental entities as of April 1. EDR works with the Bureau of Economic and Business Research (BEBR) to produce a series of high, medium and low projections. Please refer to BEBR's "Florida Population Studies, Projections of Florida Population by County, 2025-2050, with Estimates for 2024, Volume 58, Bulletin 201, August 2025," for a description of BEBR methodologies. BEBR data is used in intervening years between the Census to derive population estimates and projections. The Population Technical Bulletin uses the BEBR medium permanent estimates and projections to generate population data for the County, the municipalities and for the unincorporated area. The County then uses U.S. Census, BEBR and other data to generate population projections for planning purposes as described below.

Permanent Population

Estimates and projections for the municipalities are subtracted from total BEBR estimates and projections from the County to arrive at the unincorporated numbers. Table 1 contains BEBR and Census estimates for the five municipalities and the unincorporated area. The permanent population is broken out into "household population" and "group homes and prisoners". "Household population" is the Census term for permanent residents living in residential housing units - as opposed to hotels, group homes and jails.

For the portion of permanent population represented by prisoners and occupants of group homes, the number of Census prisoners and group home population were used to derive the total population to arrive at a permanent population minus those institutions.

Breakdown of Household Residents versus Prisoner/Group Home Population

Census Data	Whole County	Unincorporated Area	USD for Residential Capacity Analysis
Permanent population in households	153,679	126,431	119,357
Prisoners	2,343	1,909	-
Group homes residents	2,409	1,131	1,131
Total housing Units	81,371	66,644	63,783
Occupied housing units	68,750	56,648	54,066
Vacant seasonal housing units	7,854	6,282	6,166
Vacant other housing units	4,767	3,714	3,551

Sources:

- U.S. Census, 2020
- Whole County is from 2020 Census block group data

- Unincorporated County is based on 2025 Martin County Property Appraiser data and GIS incorporated boundaries.
- The seasonal housing is derived from 2020 Census block group demographics including vacancies by type where seasonal units are estimated by multiplying the seasonal vacancy rate by the total number of housing units in each block group.
- Vacant other is calculated by subtracting the seasonal vacancy from the total vacancy rate for each block group and then multiplying by the total housing units in the block group. Vacant Other for the unincorporated area is more than the 1744 "excess" vacant units in the Residential Capacity Analysis.

Seasonal population (housing) refers to the number of residents living in residential housing units who spend less than six months in Martin County. The seasonal population in terms of the demand for residential housing units is calculated by multiplying the persons per household in the unincorporated area by the "vacant seasonal housing units" as classified by the U.S. Census.

Seasonal population (facility) refers to the number of people in the unincorporated area defined as seasonal population (housing) plus part-time inhabitants who use, or may be expected to use, public facilities or services, but are not residents. This includes tourists, migrant farmworkers, and other short-term and long-term visitors. The County uses the *Seasonal population (facility)* to calculate the *Peak population (facility)* used in the planning of levels of service needs for some capital facilities.

Peak Population Methodology

Peak population is the number of permanent residents and seasonal residents. Peak population projections and estimates are used to project future housing needs and for level of service planning.

Peak Population (housing)

Table 2 contains estimates and projections for the household population and seasonal population that use residential housing for the Martin County unincorporated area. It is calculated by adding *Permanent population (housing)* and *Seasonal population (housing)*. The *Peak population (housing)* estimates and projections are used to project future housing needs.

Peak population (facility)

The Peak population (facility) refers to the entire population in the peak season and includes permanent and seasonal residents in residential housing, as well as people in group homes, prisons and tourist facilities. The projections are used in capital facility planning. Chapter 14, the Capital Improvements Element, outlines the data sources for determining the Level of Service (LOS) for various County facilities. The LOS for sewer, potable water, roads, and other facilities are calculated based on specific information related to those services, while the LOS measures for corrections, libraries collections, prisons and sidewalk/bikepaths are based on the weighted average population. Peak population (facility) is used in the calculation of the weighted average. The weighted average population as outlined in Chapter 1, Section 1.7.E. assumes that five months of

the year are peak population months and weighs the permanent and peak populations accordingly to produce the weighted average population for both countywide population and for the population of the unincorporated area.

Peak population (facility) is calculated by adding *Permanent population (facility)* to *Seasonal population (facility)* to calculate the peak population for level of service planning. The numbers include tourists, prisoners and group home residents. Table 3 shows *Peak population (facility)* projections for municipalities and the unincorporated area.

Martin County has traditionally seen a higher amount of hotel/motel revenue for five months out of the year. Out of twelve months, the highest five are considered peak months. Hotel/motel population for peak season for the unincorporated area is determined by using hotel occupancy data and hotel bed tax collections to estimate the average number of vacationers in the peak five months of the year.

1. First, annual hotel bed tax collections and hotel occupancy data are updated. Bed tax collections are provided by the Martin County Office of Management and Budget. Hotel occupancy data are provided by the Convention and Visitor's Bureau of Martin County.
2. The total of rooms rented is derived from dividing the tax revenue by average daily room rate for the month.
3. For each month, the total of rooms rented is multiplied by 2.0 (persons per room) to arrive at a functional population. The persons per room rate is a standard number used in the local hotel community.
4. The average of the highest five months of functional population are used for the hotel/motel population in the *population, peak (facility)* calculation.
5. Hotel population is distributed among municipalities and Planning Areas based on the location of each facility.

Weighted Average Population

The weighted average population assumes that five months of the year are peak population months and the remaining seven months are permanent. The permanent and peak populations are weighed accordingly to produce the weighted average population estimates. This is done by multiplying the appropriate permanent population by seven, and the appropriate peak population by five, and dividing the total by twelve. These figures are used for the levels of service calculation for four public facilities: solid waste, county corrections, library collections, open space/conservation and sidewalk/bikepaths.

Table 4 shows the weighted average population for the unincorporated area and municipalities.

Population Estimates and Projections for Municipalities and the Unincorporated Area

Table 1: Permanent Population for Municipalities and Unincorporated Area

Municipalities City/County	2024	2025	2030	2035	2040	2045	2050
Jupiter Island	814	840	854	879	899	914	927
Ocean Breeze Park	608	614	638	657	671	683	693
Sewalls Point	2,057	2,076	2,159	2,222	2,271	2,310	2,343
Village of Indiantown	6,700	6,763	7,031	7,238	7,397	7,523	7,633
Stuart	20,191	20,380	21,189	21,813	22,291	22,671	23,002
Unincorporated	134,483	135,727	141,129	145,290	148,471	151,000	153,203
Total County	164,853	166,400	173,000	178,100	182,000	185,100	187,800

Table 2: Peak population (*housing*)

Unincorporated	2024	2025	2030	2035	2040	2045	2050
Permanent population in households	131,443	132,687	138,089	142,250	145,431	147,960	150,163
Seasonal residents	14,009	14,009	14,009	14,009	14,009	14,009	14,009
Total Peak for Housing	145,452	146,696	152,098	156,259	159,440	161,969	164,172

Source:

- (1) Permanent population in households is the unincorporated permanent population minus group homes and inmates (3,040).
- (2) Seasonal residents equals Vacant Seasonal Households (2020 U.S. Census) multiplied by persons per household 2.23 (BEHR).
- (3) Total Peak for Housing is Permanent population in households plus Seasonal residents.

Table 3: Peak population (facility) for Municipalities and Unincorporated Area

Municipalities City/County	2024	2025	2030	2035	2040	2045	2050
Jupiter Island	1,097	1,123	1,137	1,162	1,182	1,197	1,210
Ocean Breeze Park	689	695	719	738	752	764	774
Sewalls Point	2,175	2,194	2,277	2,340	2,389	2,428	2,461
Village of Indiantown	7,054	7,117	7,385	7,592	7,751	7,877	7,987
Stuart	21,906	22,095	22,904	23,528	24,006	24,386	24,717
Unincorporated	145,941	147,185	152,587	156,748	159,929	162,458	164,661
Hotel Peak	32,647	32,647	32,647	32,647	32,647	32,647	32,647
Total County	211,509	213,056	219,656	224,756	228,656	231,756	234,456

Source: Martin County Growth Management

Table 4: Weighted Average by Municipalities and Unincorporated Area

Municipalities City/County	2024	2025	2030	2035	2040	2045	2050
Jupiter Island	932	958	972	997	1,017	1,032	1,045
Ocean Breeze Park	642	647	672	691	705	716	726
Sewalls Point	2,106	2,125	2,208	2,271	2,320	2,359	2,392
Village of Indiantown	6,848	6,910	7,179	7,386	7,544	7,670	7,780
Stuart	20,906	21,095	21,903	22,528	23,006	23,385	23,716
Unincorporated	139,257	140,501	145,903	150,064	153,245	155,774	157,977
Hotel Peak	32,647	32,647	32,647	32,647	32,647	32,647	32,647
Total County	203,337	204,884	211,484	216,584	220,484	223,584	226,284

Source: Martin County Growth Management

Planning Area Estimates and Projections

Map 1 illustrates Martin County Planning Areas. Tables 5, 6 and 7 reflect the distribution of population across the County's Planning Areas. It is important to note that the Planning Areas are not contiguous with either municipal boundaries or the boundaries of the County's Urban Service Districts. While estimates are accurate for the current year, the projections are more variable. The distribution is based on the average number of housing units that received certificates of occupancy (COs) in each Planning Area over the preceding five years. They are not based on project approvals and are not used for facility planning. However, the totals for all Planning Areas for Table 5 match the Countywide projections provided by BEBR.

When new Census data is available, for example the 2020 Census data, census tract and block level data are disaggregated into Planning Areas.

The total population is distributed across the Planning Areas based on the average number of certificates of occupancy (CO) in each Planning Area from 2020 to 2024. The number of COs in each Planning Area is converted to a percentage of the total number of COs in the County. That percentage is used to distribute BEBR population projections to the Planning Areas. For example, if an average of 1.5% of all COs between 2020 and 2024 were issued in the North River Shores Planning Area, then 1.5% of the population is distributed to that Planning Area. That percentage is maintained for projections to the year 2050. The table below shows the average number of COs by Planning Area used in this document:

Percentage of all COs averaged by Planning Area	
North River Shores	1.5%
North County	16.54%
Hutchinson Island	0.46%
Stuart Urban	0.61%
Palm City	7.33%
State Road 76/Port Salerno	19.78%
Mid-County	22.88%
South County	29.26%
Indiantown/West	1.65%

Table 5 shows permanent population by Planning Area. Table 6 shows peak population by Planning Area. Table 7 shows the weighted average population by Planning Area.

Map 1 – Martin County Planning Areas

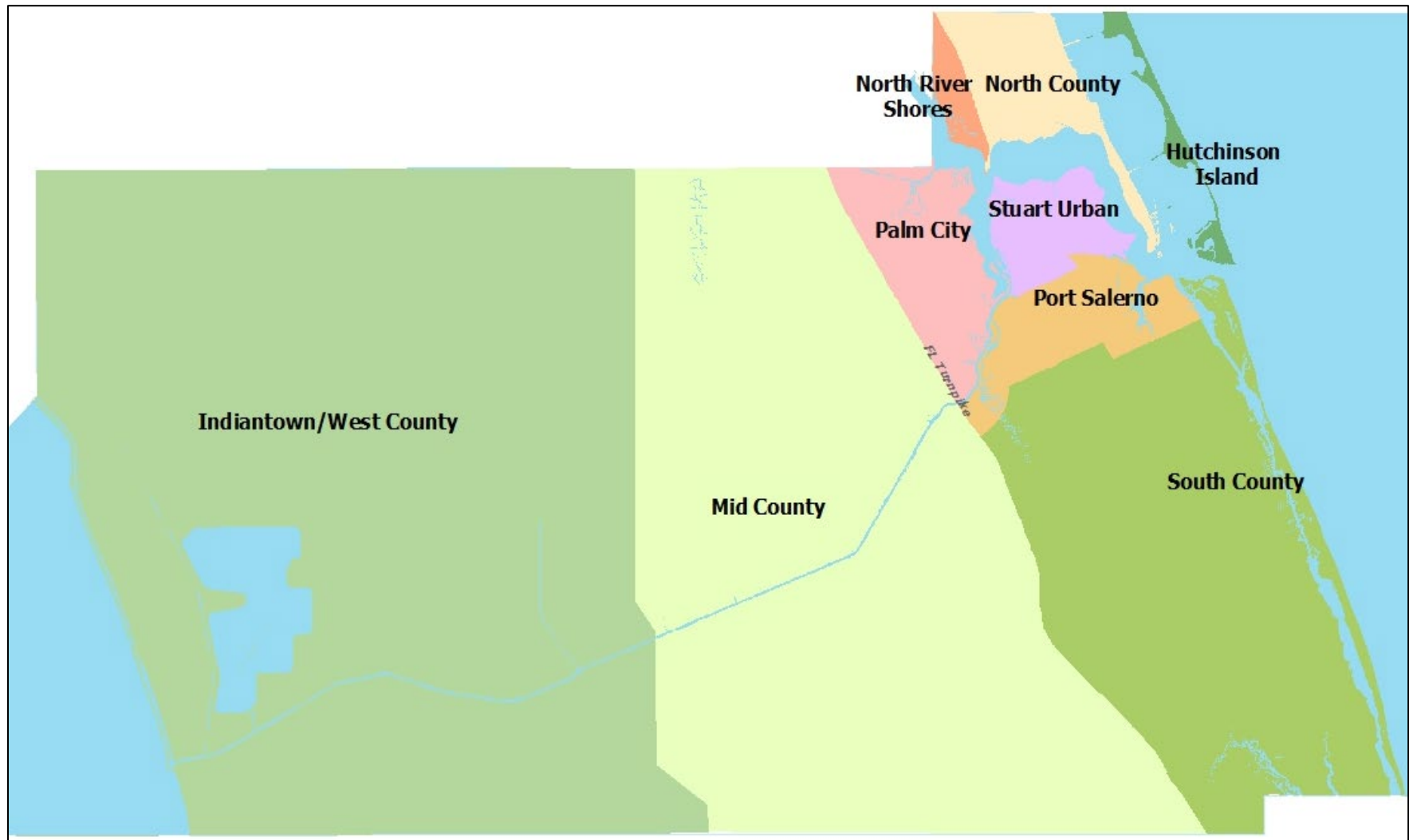


Table 5: Permanent Population by Planning Area

Comprehensive Plan Planning Areas	2024 Estimate	2025	2030	2035	2040	2045	2050
N. River Shores	5,057	5,077	5,164	5,231	5,283	5,324	5,359
North County	19,542	19,766	20,724	21,464	22,030	22,480	22,872
Hutchinson Island	2,755	2,761	2,787	2,808	2,823	2,836	2,846
Stuart Urban	22,602	22,800	23,644	24,295	24,794	25,190	25,535
Palm City	24,141	24,241	24,665	24,993	25,244	25,443	25,617
Port Salerno/76 Corridor	25,004	25,273	26,418	27,303	27,980	28,518	28,986
Mid County	13,183	13,493	14,819	15,842	16,626	17,248	17,790
South County	42,031	42,428	44,123	45,432	46,434	47,230	47,923
Indiantown/West County	10,538	10,561	10,656	10,730	10,787	10,832	10,871
Total County	164,853	166,400	173,000	178,100	182,000	185,100	187,800

Source: Totals are from Florida Population Studies, Projections of Florida Population by County, 2025-2050, with Estimates for 2024. Volume 58, Bulletin 201, August 2025,” Totals are split by unincorporated Planning Area using the 5-year average of Certificates of Occupancy, as sourced by Accela, a Growth Management land management program.

Table 6: Peak Population (facility) by Planning Area

Comprehensive Plan Planning Areas	2024	2025	2030	2035	2040	2045	2050
N. River Shores	5,267	5,287	5,374	5,441	5,493	5,534	5,569
North County	21,859	22,083	23,041	23,781	24,347	24,797	25,189
Hutchinson Island	2,819	2,825	2,851	2,872	2,887	2,900	2,910
Stuart Urban	22,687	22,885	23,729	24,380	24,879	25,275	25,620
Palm City	25,168	25,268	25,692	26,020	26,271	26,470	26,644
Port Salerno/76 Corridor	27,775	28,044	29,189	30,074	30,751	31,289	31,757
Mid County	16,388	16,698	18,024	19,047	19,831	20,453	20,995
South County	46,130	46,527	48,222	49,531	50,533	51,329	52,022
Indiantown/West County	10,769	10,792	10,887	10,961	11,018	11,063	11,102
Peak Hotel	32,647	32,647	32,647	32,647	32,647	32,647	32,647
Total County	211,509	213,056	219,656	224,756	228,656	231,756	234,456

Source: Totals are split by unincorporated Planning Area using the 5-year average of Certificates of Occupancy, as sourced by Accela, a Growth Management land management program. Totals are equivalent to projections in Table 3.

Table 7: Weighted Average Population by Planning Area

Comprehensive Plan Planning Areas	2024	2025	2030	2035	2040	2045	2050
N. River Shores	5,144	5,165	5,252	5,319	5,370	5,411	5,447
North County	20,507	20,732	21,690	22,430	22,996	23,446	23,837
Hutchinson Island	2,781	2,787	2,814	2,834	2,850	2,862	2,873
Stuart Urban	22,638	22,836	23,679	24,331	24,829	25,225	25,570
Palm City	24,569	24,669	25,093	25,421	25,672	25,871	26,045
Port Salerno/76 Corridor	26,159	26,427	27,573	28,458	29,134	29,672	30,141
Mid County	14,518	14,829	16,154	17,178	17,961	18,583	19,125
South County	43,738	44,136	45,831	47,140	48,142	48,938	49,631
Indiantown/West County	10,634	10,657	10,753	10,827	10,883	10,928	10,967
Peak Hotel	32,647	32,647	32,647	32,647	32,647	32,647	32,647
Total County	203,337	204,884	211,484	216,584	220,484	223,584	226,284

Source: Martin County Growth Management. Totals are equivalent to projections in Table 4.